

BIND**HQ**

REFERENCE CHECK QUESTIONS

BUYERS KIT

AGENCY MANAGEMENT
SYSTEM

REFERENCE CHECK QUESTIONS

1. How long has your firm been using the agency management product/s? ☐
2. Were you the decision maker responsible for purchasing the agency management solution? If so, what were your primary business needs and what made you choose the solution you selected? ☐
3. Did you run a structured AMS evaluation, if so what other vendors/products did you look at and why? ☐
4. What has been the response from your underwriters and support teams? Do you have any insight into user-engagement levels on the product that you can share? ☐
5. How complete is the integration with other internal technology systems? How hard was it to set up and maintain? ☐
6. How have you found the level of configuration on offer? ☐
7. How much time on average do you spend supporting the system internally? Would you consider that a good use of your time? ☐
8. What's the single biggest benefit of the system? What is the worst thing? ☐
9. Do you, or your team, have any complaints about the product, or any particular areas that you'd like to see improved? ☐
9. What would you say has been the most surprising part of using the product/working with the company? ☐
11. Have you experienced any unforeseen benefits and/or challenges? ☐
12. When implementing the system, did you incur any costs that you weren't expecting? ☐
13. Do you experience any business disruption when it comes to software updates or product upgrades? ☐
14. Can you tell me about your experience with support? ☐
15. If you went to another company, would you buy the same system again if given the opportunity, or would you look on the market to see what else is available? ☐